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ABSTRACT

This booklet is designed to enable Lutheran community leaders to plan the funding activities required to establish a new Lutheran high school. Treated here are the sources of funds, the relationship of those sources to each other, and the development of steps for securing funds from each source. Various types of development programs are described. The booklet points out those activities that will require funding, formulas and principles that may be used to estimate costs, and some suggestions for funding the costs incurred prior to the opening day of school. In addition suggestions are made for funding the first year the high school is in operation. (Author/MLF)

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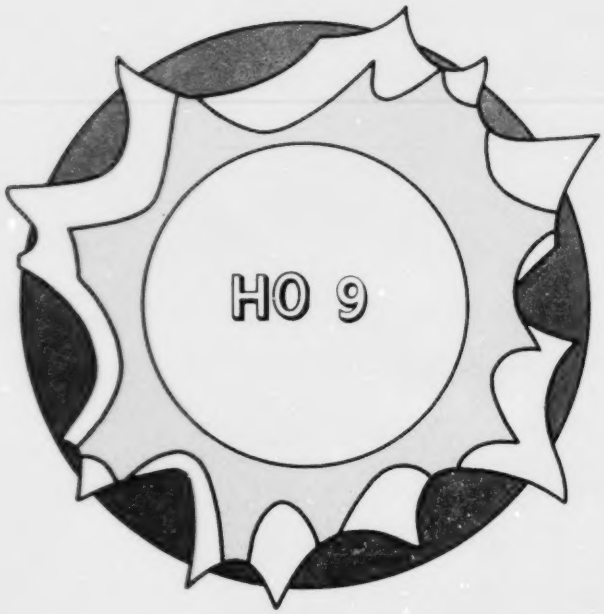


# PLANNING FOR LUTHERAN HIGH SCHOOLS

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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## *Resources for Financial Planning*

*Part One — How Lutheran High Schools Are Funded*

*Part Two — Budgeting and Funding the Exploration, Survey, Planning, and Implementation Phases*

*Part Three — Strategies for Funding the First Year*

EA 011 478

Lutheran schools in America are flourishing. This is particularly true of Lutheran secondary schools.

Many Lutheran communities are currently conducting feasibility studies to the end that they too might have a Lutheran high school for their young people. The need for materials to help Lutheran communities conduct feasibility studies and make responsible educational decisions has become quite urgent.

Through the coordinating efforts and generous financial help of the Aid Association of Lutherans, representatives of the education offices and high school associations of the Wisconsin Evangelical Lutheran Synod and The Lutheran Church-Missouri Synod have combined their efforts in the development of the *Planning for Lutheran High Schools* materials.

The *Planning for Lutheran High Schools* resources have been designed to aid Lutheran communities assess the feasibility of a high school for their young people and make plans and responsible decisions for the establishment of a school. Resource materials are also designed to assist existing schools in their ongoing operation. Consultants, experienced in the administration of Lutheran secondary education, are available to help communities use these materials. Arrangements for consultants should be made through the respective synodical education office.

The work of the following educators is herewith gratefully acknowledged: Project Director: Martin Wessler; Consultants: Neal Meitler, Al Senske; Contributors: Edward Bertram, Ray Halm, Carl Kahlfeldt, Robert Krause, Victor Peper, David Rohde, Marlin Schulz, Robert Storm, Robert Voss, Richard Wallace.

These materials are dedicated to the glory of God for the extension of Lutheran secondary education.

## RESOURCES FOR FINANCIAL PLANNING

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# PREFACE

This booklet is designed to enable Lutheran community leaders to plan well the funding activities required to establish a new Lutheran high school.

In early planning phases it will be necessary to test the feasibility of funding concepts. Developing potential funding sources will be a major clue to your planning group whether it is feasible to establish a school that is distinctively Lutheran, financially stable, and capable of expanded ministry in future years.

## RESOURCES FOR FINANCIAL PLANNING

# PART ONE—HOW LUTHERAN HIGH SCHOOLS ARE FUNDED

A. Introduction

This document speaks to the question of funding a Lutheran high school. Treated here are the sources of funds, the relationship of those sources to each other, and the development of steps for securing funds from each source.

From the start you should know that the broadest support for a Lutheran high school can best be achieved when a sense of ownership is felt by a large number of congregations on the basis of their financial commitment. A Lutheran high school that relies very little on congregational support becomes more "private" than "church-related" and lowers its potential for ministry as well as its potential for support.

A Lutheran high school should have a distinctiveness that is defined in terms of ministry to young people. It should seek to be inclusive rather than exclusive, involving broad participation by Lutheran Christians who view each other as God's people seeking to serve every young person in the Lutheran community.

Great care must be taken to avoid a narrow ministry to only the child of the rich, the highly intelligent child, the child of one theological camp, or any other restrictions of race, sex or creed.

The Lutheran high school that seeks to serve a broad cross section of young people may also expect broad financial support from the community it serves.

B. The Association Support Concept

The financial needs of a church-related high school require broad participation by congregations and/or individuals in an "association". Experience has shown that the congregational unit is the most manageable and strongest unit of membership for such an association. Membership may cross Lutheran denominational lines. "Fellowship" often limits the first level of voting membership, but associate levels of membership by other congregations and/or individuals will provide broader opportunities for ministry.

Some communities (eg., St. Louis, Milwaukee) have discovered that a minimum of 30-40% or even 50% (eg., Racine) of the high school operating costs should be borne by the constituent congregations. Small percentages tend to produce the private school setting where parents not only pay the bill but also "play the tune" by which the school is administered. You should aim for a 40-50% commitment by the member congregations. Try to start at 50% and never settle for less than 30%.

The three general sources of support covered in the following paragraphs are member congregations, tuition, and third source. The listing indicates an order of importance as well as the ideal order of descending amount of support.

C. Types of Congregational Support Plans

The list of variations for calculating the amount of congregational support is extensive. Many of them are listed here to help your committee avoid "reinventing the wheel." Analize them carefully and seek to establish a formula which promises to maintain the congregations' sense of ownership and ministry.

Pick a good plan that anticipates problems which may occur later as your association develops. Changing from one system to another may prove to be difficult in later years. Establish a support formula which encourages and will enable additional congregations to join the association.

1. The Per Communicant Assessment Plan (rarely used in its raw form) See variations under #9.

   Formula description: The annual budget is developed and a percentage of the total (eg. 50%) is assigned to congregations. The congregation total is divided by the total number of communicants in all association congregations and prorated according to the number of communicants in each.

   Advantages: Simple, objective, assigns rising costs automatically.

   Disadvantages: Over simplified in that it does not allow for differences in congregational financial ability. Experience shows that some congregations never pay when they are supposed to, causing dissatisfaction by other member congregations. Those congregations unable to bare the burden may lose their sense of ministry and drop out.

2. The Per Student Assessment on Basis of Tuition-Cost Differential Formula

   Formula description: Tuitions are subjectively set first on the basis of what might be acceptable by parents. After the total budget is figured, that portion not covered by tuition or other income is assessed of each congregation on the basis of the number of enrolled students from the congregation.

   Advantages: Emphasis is on keeping tuitions at a level which parents can afford.

   Disadvantages: Congregations pay for a service rather than minister to young people beyond their own membership. Postpones congregational awareness of actual assessment amount until enrollment figures are finalized each year. The poorer congregations may not be able to continue participation.

3. The Sliding Per-Communicant Base with Sliding Tuition Level Plan

   Formula description: A per-communicant base assessment (eg., $7 per communicant) is set. Each congregation may choose a range of participation in terms of the percentage of the base assessment (A=95-100% of base, B=75-94%, C=50-74%, D=25-49%). A different tuition level is tied to each level of congregation support.

   Advantages: Congregations involved in self-allocation toward participation. Also permits new congregations to join at lower levels of support.

   Disadvantages: Fails to develop sense of ownership by all member congregations and promotes self-serving. In cases where congregational financial ability or financial commitment is low the parent is penalized. That signals also an inability of this plan to maintain a relationship between sources of income.

4. The Percentage of Congregation's Total Budget Formula

   Formula description: Determine the subsidy budget and calculate the percentage it represents of the total of all congregations' budget. Assess each congregation that percentage of its own total budget.

   Advantages: Similar to per communicant assessment (cf. #1 above) except that it may be less of a burden for financially weak congregations than a per communicant assessment. Income may expand if congregations' total income expands.

   Disadvantages: Similar to #1, with the added disadvantage that income may contract if congregations' total income contracts, necessitating an increased percentage in the face of less ability by congregations to pay.

5. The Communicant/Congregational Giving/Student Enrollment Average Percentage Assessment

Formula description: The average of five-year average percentages in three categories is multiplied by a dollar amount required annually from all association congregations. The three categories of five-year average percentages are percentage of communicant membership, percentage of total congregational giving, and percentage of students enrolled.

Advantages: Permits early calculation of assessment on the basis of readily available data. Very objective. Good sense of ownership and ministry.

Disadvantages: Fails to provide automatic expansion of income. Additional congregations do not expand income but lighten burden of other congregations. Does not consider congregational share in relation to other income sources.

6. The Voluntary Participation Toward Goals Plan

Formula description: Any congregational contribution qualifies for membership, and the amount does not influence student tuition or fees, which are the same for all association students. Goals are set for each association congregation on the basis of a 40% collective goal.

Advantages: Voluntary aspect encourages all eligible congregations to join and promotes sense of ministry. Percentage of total cost feature preserves relationship of sources of income.

Disadvantages: Ownership responsibility is unclear. Lack of criteria may stimulate the feeling that some are not carrying their fair share.

7. Percentage of Home-Purpose Receipts

Formula description: A quota work sheet based on the past fiscal year is submitted by each congregation in order to determine their net home-purpose receipts. A percentage of total home-purpose receipts (eg., 14%) is set to cover a predetermined percentage (30-40%) of the high school budget. Congregations seeking a larger or smaller share submit their own proposal for board approval.

Advantages: Financially strong congregations minister to the weak, and all congregations are attracted to association membership. Income expands as congregational home-purpose receipts expand without raising the percentage. Calculation of each congregation's share may be done early. Ownership sense is strong. The success of this formula depends on excellent relationship between association administration and the congregations.

Disadvantages: Without a constant percentage of the total high school budget borne by the congregations, their portion tends to retreat in relation to the total. The quota sheet is detailed and requires experience to fill out accurately.

8. The Harrisburg Formula

Formula description: This formula is used for Roman Catholic inter-parochial programs similar to the Lutheran high school association concept. The average of three percentage factors (population, income, and interest) is applied to a predetermined subsidy total. The population factor is itself an average percentage of four factors: membership, infant baptisms, elementary enrollment, and secondary enrollment. The net income factor is arrived at by taking the ordinary congregational income and either: a) subtracting 10% of net debt from incomes; or b) adding 10% of net reserve to the ordinary income. The interest factor reflects each parish's accessibility

to and interest in the high school. Larger percentages are assigned to parishes close to the school.

Advantages: Ownership and ministry concepts are possible. There is a great sensitivity to the weak and burdened congregations.

Disadvantages: Does not consider congregational share in relation to other income sources. New total subsidy assessment has no formula, although it could have. Automatic expansion of income is not built in.

9. Combined Plans

Some communities combine the first two plans giving each congregation a choice between a straight per communicant assessment or the difference between tuition and actual costs on a per-student basis. The advantages and disadvantages listed under the first two plans remain applicable. The same is true when the larger of the first two plans is assessed rather than permitting a choice between the two. Some communities seek to remove inequities by using three or five year percentages of the factors in their plans. This tends to lessen, not remove inequity.

D. A Recommended Congregational Support Formula

New associations and existing associations which are dissatisfied with their formulas are encouraged to evaluate this formula. Weighting of the various factors may be changed to fit unique community circumstances.

Formula description: The average of four weighted percentage factors are applied to a predetermined percentage of the total budget. The factors are:

| Weight | | Factor |
|---|---|---|
| 50% | - | Home-Purpose Receipts (cf. worksheet) |
| 30% | - | Enrollment of Previous Year |
| 10% | - | Accessibility (1 limited accessibility; 3 fair; 5 good) |
| 10% | - | Newness and Interest (1 - new and low interest; 3 - average interest; 5 - old and high interest) |

Advantages: Ownership and ministry concepts are promoted and relationship of sources of income preserved. Expansion of income is achieved on the basis of work program projection. Calculation of congregation share based on readily available data.

Disadvantages: New congregations lighten the burden of all rather than expand the dollar base, which may also be advantageous.

On a predetermined $48,000 subsidy, or 40% of a total high school budget, this might work out as follows:

| | Home-Purpose Receipts | | | High School Enrollment | | | Accessibility | | | Newness-Interest | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Name | Dollars, | %, | weighted | No., | %, | weighted | Rating, | %, | weighted | Rating, | %, | weighted | |
| St. Marks | 200,000 | 40% | 20% | 30 | 21% | 6% | 1 | 10% | 1% | 5 | 50% | 5% = 32% | $15,360 |
| Asscension | 150,000 | 30% | 15% | 40 | 29% | 9% | 5 | 50% | 5% | 1 | 10% | 1% = 30% | $14,440 |
| Holy Cross | 100,000 | 20% | 10% | 50 | 36% | 11% | 3 | 30% | 3% | 3 | 30% | 3% = 27% | $12,960 |
| Olivette | 50,000 | 10% | 5% | 20 | 14% | 4% | 1 | 10% | 1% | 1 | 10% | 1% = 11% | $ 5,280 |
| | $500,000 | 100% | 50% | 140 | 100% | 30% | 10 | 100% | 10% | 10 | 100% | 10% = 100% | $48,000 |

TYPES OF CONGREGATIONAL SUPPORT - A COMPARATIVE EVALUATION

| Y = Yes<br>M = Maybe<br>N = No | Promotes sense of ownership | Promotes sense of ministry | Preserves relationship of sources of income | Automatic expansion of income | Basis of automatic expansion of income | Encourages other congs. to join | Permits early estimate of cong. share | Based on readily available cong. data | Accounts for cong. financial ability |
|---|---|---|---|---|---|---|---|---|---|
| 1. Per Communicant Assessment | Y | M | M | M | cost increase | M | N | Y | N |
| 2. Per Student Assessment Based on Tuition-Cost Differential | M | N | N | M | enrollment | M | N | Y | N |
| 3. Sliding Per-Communicant Base with Sliding Tuition Level | N | N | N | M | percentage | Y | Y | Y | Y |
| 4. Percentage of Total Cong. Budget | Y | M | M | M | cong. income | M | N | Y | N |
| 5. Communicant/Congregational Giving/ Student Enrollment Average Percentage | Y | Y | N | N | none | M | Y | Y | M |
| 6. Voluntary Participation Toward Goal | M | Y | Y | M | percentage | Y | M | N | N |
| 7. Percentage of Home Purpose Receipts | Y | Y | Y | Y | percentage | M | Y | Y | Y |
| 8. Harrisburg Formula | Y | Y | N | Y | percentage | M | Y | Y | Y |
| 9. Combined Plans | Not evaluated | | | | | | | | |
| 10. The Recommended Formula | Y | Y | Y | Y | percentage | Y | Y | Y | Y |

LUTHERAN HIGH SCHOOL ASSOCIATION OF _____

WORKSHEET REPORT FOR ESTABLISHING THE _____ CONGREGATIONAL QUOTA
(year)

FOR _____
Name of Congregation

A. Total Congregational Income $_____
(Include all items which flow into or through the congregational treasury. Do not include any beginning of the year fund balances.)

B. Items to be excluded: (only if included in A. above)

1. Where Parochial School used Congregational treasury
   a. Elementary School Tuition (non-member) $ _____
   b. Elementary School Registration and/or Book Fees _____
   c. School Bus Fares (Where parents pay for school bus service to the congregation to help defray the cost of providing this transportation.) _____
   d. Tuition from another congregation(s) who has an agreement with your congregation to educate their children in your school.
      _____Church _____

2. Reimbursements _____

3. Monies derived from Loans, Mortgages, or other borrowings (name of lendor or type of obligation), Special Building or Debt Retirement Drive (of non-repetative nature which would distort annual financial picture).
   _____ _____
   _____ _____

4. Investment Income _____

5. Proceeds from sale of Congregational Assets _____

6. Subsidies (i.e. Mission Congregation or support from a foundation) _____ _____

7. Other (Please give brief explanation):
   (i.e. Memorial Wreaths remitted to other organizations which are included in receipts and only flowed through congregational teasury, substantial Bequests or Legacies not used for current home purposes.)
   _____ _____
   _____ _____
   _____ _____

_____

C. Adjusted Congregational Receipts $_____

D. Adjusted Congregational Receipts $_____

E. Deduct Expenditures to Outside Agencies:
(The Lutheran High School Ass'n is not considered to fall into this catagory but rather is looked upon as a home purpose educational extension for Ass'n. congregations who through their incorporation in this Ass'n. own and operate our Lutheran high schools under their Articles of Incorporation and By-Laws.)

1. Missions: (Amount remitted to District Treasurer for District and Synodical Budget.) $_____

2. _____ _____
_____ _____
_____ _____
_____ _____
_____ _____ _____

F. Tentative Work at Home Receipts $_____

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

To be completed by Association Office

G. Adjustments made by Association _____

H. Final Work at Home Receipts $_____

_____% QUOTA _____per year _____per month.

Please complete information at bottom of this page.

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

INSTRUCTIONS:

1. To be prepared by Treasurer or member of Financial Board in triplicate: Original - Association, copies for Church Office & Treasurer.

2. If additional space is needed, indicate "schedule attached" and list only total of amounts itemized on separate sheets.

3. Original of this worksheet to be forwarded along with congregation's Annual Financial Report, by (date) (reflecting financial information for the year just completed), to The Lutheran High School Association of _____
address _____
_____

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

This report is based on the Annual Financial Report of

_____Church for the year ended

_____,19__. Prepared by:_____

Dated:_____ Title:_____

Telephone:_____

E. Tuition and Fees - The Second Income Source

Even if tuition income exceeds other income sources in total dollars, it should be viewed as a secondary source for Lutheran high school support. This encourages continued ownership and ministry by congregations.

Equally important, the calculation of tuition rates after calculation of congregational support enables accurate application of budget costs to tuition formulas and results in adequate funding for balanced budgets.

Use of a tuition formula is not only desirable but necessary to achieve financial stability and preserve credibility with constituent groups. The formula itself may vary in design, but the following criteria are important.

Criteria

1. The enrollment projection must have a high degree of reliability nine months before the beginning of the school year for which tuition rates are being set.

2. The preliminary budget must be realistically calculated by this time so that congregational and third source shares of the program can be established before the tuitions are set.

3. The tuition formula must begin with the total cost per student and absorb the proportion not covered by any other source of income.

4. Discounts and rebates to some students must be accounted for and may result in additions to the tuitions of the other students.

Factors

The following factors are presupposed for purposes of our example in setting a tuition formula.

| | | |
|---|---|---|
| First source, congregational share, | 40% of budget | $ 48,000 |
| Second source, tuition receipts, | 50% of budget | 60,000 |
| Third source income projection, | 10% of budget | 12,000 |
| | Total Budget | $120,000 |

Projected enrollments are also known, and for purposes here are:

| | | |
|---|---|---|
| Association students | (90% of enrollment) | 90 |
| Non-association students | (10% of enrollment) | 10 |
| | Total enrollment | 100 |

Reduced tuition grants and 2nd child reduced tuitions are presupposed as follows:

| | |
|---|---|
| 18 grants @$200 for assn. students | $3,600 |
| 2 grants @$200 for non-assn. students | $ 400 |
| 20 reduced tuitions @$200 | $4,000 |

Association Student Formula

| | | |
|---|---|---|
| Cost per student | $1,200.00 | $1,200.00 |
| Less assn. cong. commitments ($48,000 ÷ 90 assn. stu.) | | -533.33 |
| Less third-source projection ($12,000 ÷ 100 students) | | -120.00 |
| | SUBTOTAL | $ 546.67 |
| Plus portion of 20 reduced tuitions ($4,000 ÷ 100) | | + 40.00 |
| 72 assn. students at full rate | | $ 586.67 |
| 18 assn. students at reduced rate | | $ 386.67 |

Non-Association Student Formula

| | |
|---|---|
| Cost per student | $1,200 |
| Less third source projection ($12,000 ÷ 100 stu.) | -120 |
| SUBTOTAL | $1,080 |
| Plus portion of 20 reduced tuitions ($4,000 ÷ 100 stu.) | + 40 |
| 8 Non-assn. students at full rate | $1,120 |
| 2 Non-assn. students at reduced rate | $ 920 |

Summary of Income:

| | | | |
|---|---|---|---|
| Congregation Commitments | | | $48,000 |
| Tuition: | 72 Assn. students @$586.67 | $42,240 | |
| | 18 Assn. students @$386.67 | 6,960 | |
| | 8 Non-assn students @$1120 | 8,960 | |
| | 2 Non-assn. students @$920 | 1,840 | $60,000 |
| Third-Source Income | | | $12,000 |
| Total Income (also equal to total budget) | | | $120,000 |

F. Third-Source Income Plans

1. Definition

Most Lutheran high schools rely to some extent on sources other than congregation support (first source) and tuition income (second source) to fund their programs. "Third source" is a term often used to describe all other sources of income, whether they be individuals, groups, or corporations, or whether they be in the nature of gifts, investment income, or even profits. The following section emphasizes third source gifts rather than investments for profits.

2. Relationship of Income Sources

Significant sums of financial support may be generated from third sources, but care should be taken not to make the annual operating budget dependent on them. As a rule of thumb, no more than 10% of operating income should come from third sources. Should your school succeed in attracting more than 10%, the donors should be helped to designate their gifts to endowment, capital expansion or special projects outside the operating budget.

3. Fundamentals of Development

The most important principle to be remembered in developing third source income is that programs must be measured in terms of people and involvement in ministry. The development task is always an attempt to involve more and more people in the ministry of helping God's young people. Establishment or maintenance of the institution, the need for dollars, or the obligation of constituents is <u>not</u> the primary purpose; but the serving of God's young people must always be the beginning and end of development. That is ministry!

The chief technique of development is the provision of a variety of avenues through which the constituent member of the institution may easily and joyfully participate. Recognizing every gift with a receipt and a word of thanks is essential. If possible, help donors recognize each other by name, not by amount of gift. A "development newsletter" may be useful in accomplishing this.

4. Types of Development Programs

Every development program should be carefully planned in terms of source and designation, so that those who are being asked to become involved clearly understand where the money is being sought and where it will be spent. Various types of programs are described below chiefly from the perspective of source rather than designation.

Annual Appeals

The title is purposely plural--"appeals". Restricting your development effort to one "annual appeal" limits the scope, prevents flexibility, and hinders creativity in the development program. Aim instead for a variety of annual appeals. *Alumni* are an obvious target group; each year set for them a higher dollar goal, promote competition between graduate classes, encourage broad participation, and enlist alumni involvement by seniors before graduation. If your donor or prospective donor list permits, annualized appeals may go to *parents* of current students or *parents* of graduates. Present an opportunity to *businesses* from which your school buys goods and services to contribute to your program.

Make an annual *scholarship aid* appeal in behalf of families who require tuition relief or grants-in-aid. *Christmastime* and the *end of the calendar* year are prime times to seek involvement of those who have not given. The *end of* your school's *fiscal year* may provide a "last chance" opportunity for some to respond. The reasons for multiple appeals are obvious. Different people with different interests respond to different appeals or at different times of the year. Happily, some people respond to almost all appeals and give several times each year.

Systematic Giving Organizations

The establishmant of giving organizations is a technique used to provide a reliable base of dollar support which may be annually expanded or "upgraded," Names of such organizations might be "Century Club," "Trust Fund," "Gift-a-Month," or "Lutheran High Founders." More than one sustaining membership organization may be formed for a variety of donor gift levels. Enrollment in a giving organization should be formalized to help people make an ongoing commitment. A variety of giving schedules (monthly, quarterly, semi-annually) as well as dollar categories should be available. Reminders and postpaid gift envelopes will dramatically sustain individual commitments. An annual event, membership list or directory, membership awards, and other techniques maintain mutual recognition, a sense of belonging and a sense of involvement in ministry.

Memorials Program

A modest expenditure of dollars in the development and distribution of memorial materials will generate a reliable flow of modest gifts. Recognition of memorialees and donors is especially important here.

General Fund Drive

Care should be taken to promote comprehensive general fund drives only for extraordinary needs such as debt liquidation or capital expansion. Participants should receive a sense of progress and accomplishment as well as periods of relief before another major effort is initiated. Some major drives may have a series of "phases" to sustain interest over a longer period of time.

Special Occasion or Crisis Appeals

Anniversaries and crises are ideal points to challenge the Lutheran High Family. Don't make every appeal a crisis. Reserve the panic appeal for genuine crises. Always maintain the integrity of your ministry and interpret accurately the financial strength of your institution.

Deferred Giving Programs

Sometimes called "planned giving," deferred giving refers to those gifts which mature at some point in the future on the basis of a current commitment. *Bequests* are perhaps the most common example of deferred giving. *Giving through life insurance* is currently receiving revived attention. A variety of *trust* instruments and *life income agreements* may be promoted to encourage deferred gifts. An in-depth *estate planning* service to your

people will result in sizable gifts through the years. "Endowment" appeals which give lasting recognition to the donor help stimulate such gifts. Use of the Synodical foundation as trustee for charitable estate planning instruments is recommended.

Fund-raising Activities

The school administration should generally leave the sale of foodstuffs, auctions, and other fund-raising events as an area for involvement by student and auxiliary organizations. The ministry aspect of development is not easily maintained in these activities, and the rate of return may not be commensurate with the expenditure of effort by the administration.

5. Development Responsibility

The chief executive officer of the institution has primary responsibility for development. In a small association it may become necessary to engage a high school principal to relieve the chief administrator of some in-school responsibilities and provide the time he needs to pursue development tasks. In the larger system he may engage a full-time staff to fulfill his development objectives.

Even where a full-time development director is engaged, a continuing emphasis on volunteerism must be maintained. Volunteers for in-house mechanical tasks, for referrals, for membership organizations, for alumni associations, for auxiliaries, for face-to-face solicitation--all are necessary for a comprehensive program.

A development budget must be provided. A sum equal to one-half the chief administrator's salary (if no full-time development man is present) or a sum equal to the full-time development person's salary represents a minimum recommendation. Budget planning groups should proceed with the confidence that competent development personnel will generate third source income equal to many times the dollars spent on the development program.

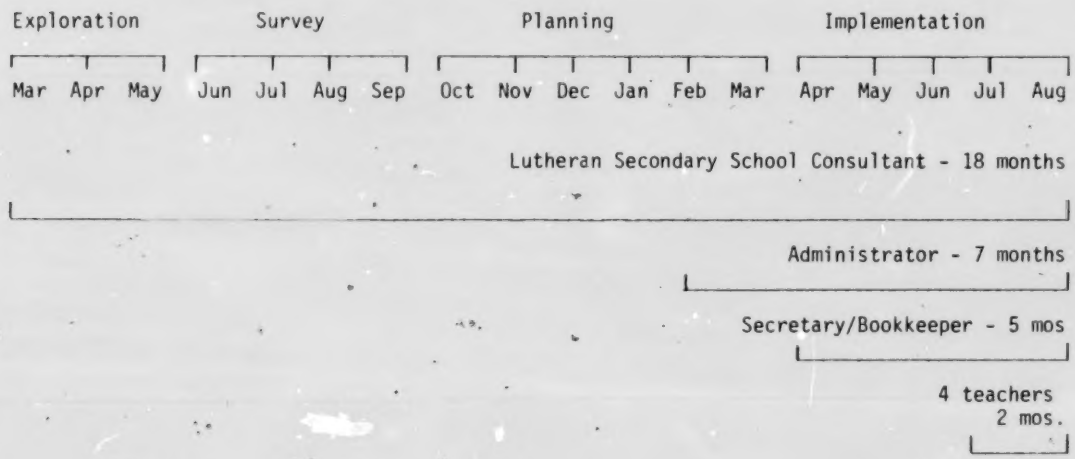
# PART TWO — BUDGETING AND FUNDING THE EXPLORATION, SURVEY, PLANNING, AND IMPLEMENTATION PHASES

A. Introduction

This document seeks to point to those activities which will require funding, formulas and principles which may be used to estimate costs, and some elementary suggestions for funding the costs incurred prior to the opening day of school.

B. The Time Frame

The model outlined in this document presumes an eighteen month time frame, and alterations to that time frame must always be iniated from the target date of opening school. The proposed model may have an extended exploratory phase, but expert consultative help should not be unduly delayed.


Exploration
Survey
Planning
Implementation
Mar Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May Jun Jul Aug
Lutheran Secondary School Consultant - 18 months
Administrator - 7 months
Secretary/Bookkeeper - 5 mos
4 teachers
2 mos.

C. Activities Requiring Funding

1. Consultation

A number of Lutheran Secondary School consultants have been specifically trained to help communities in the early phases of their exploration. For this reason it is advisable to contact such a consultant at the earliest possible date--before any binding decisions or commitments have been made. Not only is this course of action more economical than calling a full-time administrator; it is also less risky and provides the flexibility for arriving at more objective decisions.

Names of qualified consultants and information on costs for engaging a consultant may be obtained from the Secretary for Secondary Schools at the Synodical headquarters. The budget model on page 17 suggests that up to $4,932 may be spent on a complete consultation package.

2. Office Supplies

Bond paper and envelope stock will be required for letterhead use in correspondence.

Mimeo/offset stock will be used for general mailings to all constituent families as well as multiple mailings to families with prospective students. At least three church bulletin inserts should be planned and perhaps also a church newsletter insert.

3. Printing and Mimeo

Printing costs may be reduced by using the facilities and/or services of a prospective participating congregation, but some costs should be budgeted. Printing costs money! Costs may be roughly estimated by the number of times through the press. The recruitment/development piece (s) should be attractive and should answer the multitude of questions people will be asking about the new school. Help people respond to mailings through the use of postpaid reply envelopes.

4. Services and Resources

The early procurement and use of Planning for Lutheran High Schools manuals is important. Because Aid Association for Lutherans funded the development of these materials, your cost is nominal. Budget copies for all key people. Professional services for logo development, legal counsel, and other services should also be budgeted.

5. Postage

Congregations may help with mailings or include high school materials in their regular mailings. Some separate mailings are important, however, especially for prospective students. Secure a non-profit bulk permit and business reply permit (or use existing permits). Recruitment mailing calculations should be liberal in order to keep a steady stream of information going to enrollees and potential enrollees alike. Calculate high school prospect families at 7½% of total communicants and multiply this number times the total number of mailings.

6. Equipment

The assumption is made that some equipment will be temporarily available gratis until just before school is opened. If not, the budget should also provide for a typewriter, mimeo machine, tables, desks, chairs, etc. A telephone and printing calculator may also be necessary purchases.

7. Personnel

Salaries for initial full-time workers must be decided early, but care should be taken that the salaries can be fit later into a comprehensive salary schedule for all workers. Refer to document H12, RESOURCES FOR INSTRUCTION PLANNING, in order to set realistic budget figures for administrator (7 months), secretary-bookkeeper (5 months), and four teachers (2 months).

8. Facilities

Very likely it will be possible to find rent free office facilities for the administrator and his secretary until shortly before school opens. However, budget provisions must be made for at least one month's rental and renovation of the new school's facilities. The rental figure may include utilities and maintenance by the landlord. As the Facility Committee and Curriculum Committee progress in their planning (see H03, STEERING COMMITTEE HANDBOOK), accurate figures will emerge for the budget.

D. The Model Budget and Cash Flow Chart (See pages 17 - 18)

The model budget may be used until such time as more accurate figures are determined on the basis of your own study. Add 5% to 6% for each year beyond 1977. A word of caution regarding the use of donated facilities and equipment--don't extend this practice beyond the formal decision to establish a school! Make budget provision for all needs at a high enough level that will gain the respect of the community and the staff. Don't become a "stepchild" school that receives the castoffs others no longer want to use.

This chart shows rather dramatically that costs will be incurred fairly evenly during the

early months, but will escalate rather rapidly during the last seven months before school opens. This design is intentional, for it provides the Steering Committee several natural points in time to make the deliberate decision whether or not additional phases should be begun and funds sought for that activity.

E. Securing Funds for Survey, Planning, and Implementation Phases

Part I of this booklet includes suggestions for the development of an organizational structure for fund-raising. The following paragraphs attempt to focus attention on the securing of modest amounts of money prior to the opening of school rather than on the bigger and more extensive long-range needs.

1. Philosophy Regarding the Source of Initial Funds

Usually there are no costs incurred during the very early exploratory phase. Concerned people merely come together to share their interest and concern at personal cost. As their zeal mounts, they begin to catch a vision of what might come of their common concern, and their first temptation will be to spread the word that money is needed immediately to initiate additional steps toward the establishment of the school which they are planning. Great care should be taken in these earliest steps so that the Lutheran community is not given misimpressions on the basis of the way in which these initial funds are collected.

Concerned people who envision the establishment of a locally supported and controlled high school should not hesitate to work with District officials in the early planning phases. Most districts are greatly concerned and interested in giving their aid toward the establishment of new ministries which will fortify their members and expand their witness to the community. It may even be possible, expecially if there is some lead time, to help the District itself catch the vision of this ministry and allocate funds it has available to underwrite early costs. If that is not possible, at the very least, an attempt should be made to have the District President write to pastors and members of the area on behalf of the planning group to encourage them to give their prayers and support to this project. In many cases no funding will come from this source, but the involvement of District leadership from the first will give the high school ministry a stability it could never achieve without that involvement.

The early planning group may itself decide to contribute personal funds in modest or substantial amounts to enable the group to proceed with its tasks. Here, again, care should be taken that the impression is not given that these few people have a vested interest in the project and are "buying" with their contributions a part of the control of the school. This can be avoided if the early call for funds is also extended to people not serving on the Steering Committee and clearly states that the need for such funds is limited to survey and planning phases of the project.

Costs incurred at the point when the administrator is hired properly belong to the prospective membership of the organization. That is to say, congregations and their members who will later comprise the membership of the high school association should be invited to recognize this kind of cost as a part of their commitment to this ministry. Should it be impossible to obtain that kind of support before the administrator is hired, the Steering Committee should be alerted to a danger signal indicating that support may not be forthcoming later.

2. Formalization of Budget

It would be well during the survey phase to draft a budget similar to the model provided at the end of this section. Present the budget to prospective congregations and obtain their commitment to at least the last seven-month portion of that budget several months before that time period begins. In order to accomplish this, it may be necessary to include some figures from the model budget which your committee has not researched. That would be a better procedure than to delay formal adoption of the budget and make it necessary to cover the cost of these phases from outside the constituent congregations.

3. Sources for Funding the Budget

"Where do we begin?" is the common question, and an attempt has been made in the follow-

ing paragraphs to develop steps to take in seeking financial help. Items a. to e. should cover costs for the first eleven months. Item f. should occur before the administrator is hired.

a. Explore the availability of funds with your District. Meet with the Education Executive and the District President. Don't ask for funds to "start a school", but seek seed money, a few hundred or a few thousand dollars.

b. Call the Synod's Office of Education for direction. Learn the name of the Chairman of the Association of Lutheran Secondary Schools and seek an exploratory session with him. Ask whether funds are available for an initial interview trip by a Lutheran secondary school consultant.

c. Ask Aid Association for Lutherans branches and other auxiliaries to sponsor fund raising events. In the case of the former, matching grants increase the potential result.

d. Receive the blessing of area pastors to seek $100 each from a list of 100 prospects who are members of area congregations. Appoint two members of your group to do this job, including: develop an address and telephone prospect list of 100 people, write and mimeograph a letter (signed by the Steering Committee Chairman) asking each prospect for $100 toward the goal of $7,000 in order to survey the community and explore the establishment of a Lutheran high school (enclose copy of District President's letter and a stamped return envelope), call those who do not respond within two weeks, write and mail a report of results to all prospects, and enclose a letter of thanks to those who have contributed.

e. Ask the pastors to include in their congregation newsletter and in two consecutive Sunday worship bulletins an appeal for voluntary contributions by members, stating the Pastor's personal support and willingness to contribute.

f. Propose that each congregation, on the basis of communicant membership, assume in their budget a share of costs budgeted for the twelfth through eighteenth months. In a community of 20,000 communicants the suggested model budget would call for $1.38 per communicant.

g. Permit interested donors to contribute specific amounts required to cover the cost of a budgeted item, such as a calculator, student handbook, accounting system, or rental/remodeling costs.

A multitude of additional events and solicitations may be used. See Part One of this booklet for more ideas. A final caution - do not neglect to permit congregational participation at an early date.

BUDGET FOR THE EXPLORATION, SURVEY, PLANNING AND IMPLEMENTATION PHASES
(18 months prior to school opening)

| | Organization Committee | Enrollment Committee | Finance Committee | Site Planning Committee | Instruction Committee | Unit Totals | Category Subtotals |
|---|---|---|---|---|---|---|---|
| 1. Consultation: | | | | | | | |
| consultant | 2,700 | | | | | 2,700 | |
| travel | 1,296 | | | | | 1,296 | |
| lodging | 360 | | | | | 360 | |
| meals | 216 | | | | | 216 | |
| hosp. and misc. | 360 | | | | | 360 | |
| Subtotals | 4,932 | | | | | | 4,932 |
| 2. Office Supplies: | | | | | | | |
| 8½ x 11 stationery bond stock ($10/M) | 8 | 6 | 2 | 2 | 2 | 20 | |
| No. 10 envelope bond stock ($10/M) | 4 | 3 | 1 | 1 | 1 | 10 | |
| 8½ x 11 mimeo/offset stock (white) ($5/M) | 25 | 75 | | | | 100 | |
| 8½ x 11 mimeo/offset stock (color) ($5/M) | 10 | 40 | | | | 50 | |
| 5½ x 8½ mimeo/offset stock (color) ($3/M) | 20 | 40 | | | | 60 | |
| No. 10 envelope stock ($10/M) | 40 | 110 | | | | 150 | |
| No. 9 envelope stock ($10/M) | 40 | 110 | | | | 150 | |
| Miscellaneous | 53 | 66 | 7 | 7 | 7 | 140 | |
| Subtotals | 200 | 450 | 10 | 10 | 10 | | 680 |
| 3. Printing and Mimeo: | | | | | | | |
| Letterhead bond and mimeo/offset ($6/M) | 52 | 80 | | | | 132 | |
| No. 10 bond letterhead envelope ($6/M) | 6 | | | | | 6 | |
| Bulletin inserts (2 sides) ($6/M) | 60 | 180 | | | | 240 | |
| Newsletter insert (2 sides) ($6/M) | 80 | | | | | 80 | |
| No. 10 cover envelopes ($6/M) | 25 | 65 | | | | 90 | |
| No. 9 business reply envelope ($6/M) | 25 | 65 | | | | 90 | |
| Recruitment/Devel. Brochure @25¢ | 707 | 707 | | | | 1,414 | |
| Student Handbook @$1 | | 200 | | | | 200 | |
| Accounting system | | | 100 | | | 100 | |
| Subtotals | 955 | 1,297 | 100 | | | | 2,352 |
| 4. Services and Resources: | | | | | | | |
| ALSS Resource Books | 100 | | | | | 100 | |
| Logo Development | 100 | | | | | 100 | |
| Public Relations, Legal and Other | 200 | | | | | 200 | |
| Fund-raising | | | 100 | | | 100 | |
| Subtotals | 400 | | 100 | | | | 500 |
| 5. Postage: | | | | | | | |
| Bulk permit | 15 | 45 | | | | 60 | |
| Business reply permit | 8 | 22 | | | | 30 | |
| Bulk mailing postage | 75 | 225 | | | | 300 | |
| First class postage | 250 | 750 | | | | 1,000 | |
| Business reply postage | 26 | 104 | | | | 130 | |
| Address corrections, etc. | 26 | 54 | | | | 80 | |
| Subtotals | 400 | 1,200 | | | | | 1,600 |
| 6. Equipment: | | | | | | | |
| Telephone | 125 | | | | | 125 | |
| Calculator | | | 250 | | | 250 | |
| Subtotals | 125 | | 250 | | | | 375 |
| 7. Personnel: | | | | | | | |
| Administrator interview | 200 | | | | | 200 | |
| Administrator salary @$1,250/mo. | 8,750 | | | | | 8,750 | |
| Administrator's Ret. and Wel. @13½% | 1,182 | | | | | 1,182 | |
| Administrator's travel @$125/mo. | 875 | | | | | 875 | |
| Administrator's moving | 1,500 | | | | | 1,500 | |
| Secretary salary @$700/mo. | 3,500 | | | | | 3,500 | |
| Secretary Ret. and Wel. @13½% | 473 | | | | | 473 | |
| Teachers (4) salary @$937.50/mo | | | | | 7,500 | 7,500 | |
| Teachers (4) Ret. and Wel. @13½% | | | | | 1,012 | 1,012 | |
| Teachers (4) moving | | | | | 2,000 | 2,000 | |
| Subtotals | 16,480 | | | | 10,512 | | 26,992 |
| 8. Facilities: | | | | | | | |
| Rental of temporary quarters | | | | 1,000 | | 1,000 | |
| Preparation of quarters | | | | 1,500 | | 1,500 | |
| Subtotals | | | | 2,500 | | | 2,500 |
| TOTALS | $23,492 | $2,947 | $460 | $2,510 | $10,522 | | $39,931 |

CASH FLOW CHART
(Based on 18-Month Budget, Exploration Through Implementation Phases)

| | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | TOTALS | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. Consultation - all items | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 274 | 4,932 | |
| | | | | | | | | | | | | | | | | | | | | $ 4,932 |
| 2. Office Supplies - 2 items | 30 | | | | | | | | | | | | | | | | | | 30 | |
| 3 items | | | | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 210 | |
| 3 items | 25 | 24 | 25 | 24 | 25 | 24 | 25 | 24 | 25 | 24 | 25 | 24 | 25 | 24 | 25 | 24 | 24 | 24 | 440 | |
| | | | | | | | | | | | | | | | | | | | | 680 |
| 3. Printing and Mimeo - 2 items | 138 | | | | | | | | | | | | | | | | | | 138 | |
| 4 items | | | | 33 | 33 | 34 | 33 | 33 | 34 | 33 | 33 | 34 | 33 | 33 | 34 | 33 | 33 | 34 | 500 | |
| 1 item | | | | 1,414 | | | | | | | | | | | | | | | 1,414 | |
| 1 item | | | | | | | | | 200 | | | | | | | | | | 200 | |
| 1 item | | | | | | | | | | | | | | 100 | | | | | 100 | |
| | | | | | | | | | | | | | | | | | | | | 2,352 |
| 4. Service/Resources - 2 items | 200 | | | | | | | | | | | | | | | | | | 200 | |
| 1 item | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 12 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 11 | 12 | 200 | |
| 1 item | | | | | | | | | | | | | | 20 | 20 | 20 | 20 | 20 | 100 | |
| | | | | | | | | | | | | | | | | | | | | 500 |
| 5. Postage - 2 items | | | | 90 | | | | | | | | | | | | | | | 90 | |
| 3½ items | | | | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 84 | 1,260 | |
| ½ item | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 13 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 14 | 13 | 250 | |
| | | | | | | | | | | | | | | | | | | | | 1,600 |
| 6. Equipment - 1 item | | | | | | | | | | | | | | 25 | 25 | 25 | 25 | 25 | 125 | |
| 1 item | | | | | | | | 250 | | | | | | | | | | | 250 | |
| | | | | | | | | | | | | | | | | | | | | 375 |
| 7. Personnel - 1 item | | | | | | | | | | 200 | | | | | | | | | 200 | |
| 3 items | | | | | | | | | | | | 1,544 | 1,544 | 1,544 | 1,544 | 1,544 | 1,544 | 1,543 | 10,807 | |
| 1 item | | | | | | | | | | | | 1,500 | | | | | | | 1,500 | |
| 2 items | | | | | | | | | | | | | | 795 | 794 | 795 | 794 | 795 | 3,973 | |
| 2 items | | | | | | | | | | | | | | | | | 4,256 | 4,256 | 8,512 | |
| 1 item | | | | | | | | | | | | | | | | | 2,000 | | 2,000 | |
| | | | | | | | | | | | | | | | | | | | | 26,992 |
| 8. Facilities - 1 item | | | | | | | | | | | | | | | | | | 1,000 | 1,000 | |
| 1 item | | | | | | | | | | | | | | | | | | 1,500 | 1,500 | |
| | | | | | | | | | | | | | | | | | | | | 2,500 |
| Monthly Budget: | 692 | 323 | 324 | 1,958 | 455 | 455 | 455 | 704 | 656 | 654 | 455 | 3,499 | 1,999 | 2,938 | 2,839 | 2,838 | 9,093 | 9,594 | 18 mo. TOTAL | $39,931 |
| Rounded: | 650 | 650 | 650 | 650 | 650 | 650 | 650 | 650 | 650 | 650 | 631 | 2,825 | 2,825 | 2,825 | 2,825 | 2,813 | 9,343 | 9,344 | 18 mo. TOTAL | $39,931 |
| Phase Totals: | | | | | | | | | | | 7,131 | | | | | 14,113 | | 18,687 | 18 mo. TOTAL | $39,931 |

# PART THREE — STRATEGIES FOR FUNDING THE FIRST YEAR

A. Introduction

"Think big but keep it simple" has been an effective guide for many funding efforts. Establishing a funding program the first year requires bold and prompt action and must rely on steps which are readily understood and carried out.

B. Walking Through the Steps

The Financial Planning Committee is advised to make orderly progress toward funding by the use of the following steps. It will be their task to report regularly to the Steering Committee so that constituent groups are advised of progress and begin to claim ownership in the process.

1. Establish ideal percentages for the three sources of income, eg., congregational commitments 40%, tuitions 50%, third source 10%. If the ideal cannot be attained during the first year, set the percentages lower, eg., 30%, 65%, 5%, and establish one year in advance percentages that move closer to the ideal, eg., 33%, 60%, 7%. See Part One of this document for more on this concept.

2. Establish a reliable budget for the coming year (and prepare a five year projection). See Document H10, MAINTAINING FISCAL RESPONSIBILITY for guidelines on this subject.

3. Adopt a congregation support formula and apply it to the congregational share of the work program.

4. Adopt a tuition formula and apply it to the projected enrollment.

5. Adopt a third source dollar goal, plan the projects and the goal for each, and assign responsibility for each project.

C. Some Third Source Projects for the First Year

Your committee may be tempted to initiate a wide variety of efforts immediately, but it is advised that you settle on no more than three or four projects. One which may receive widespread participation would be the enlistment of congregational auxiliaries in projects of their choice to raise funds for the new school. Especially important will be the involvement of AAL branches in sponsoring such projects so that matching funding might be obtained for them from the Aid Association for Lutherans benevolence program.

"Passing the hat" is still one of the very effective methods for involving a large number of people in support of a given cause. Not only should your committee encourage this practice at meetings called for the planning and establishment of the school, but should encourage pastors to sponsor such collections in their congregations at Christian education services and other gatherings on the congregation level.

Permission should be sought from participating congregations to direct a general mail appeal to the membership of the participating congregations. The appeal letter should be signed by the administrator if he is already on scene or by the chairman of the Steering Committee. A business reply gift envelope should be included in the mailing. At least one and perhaps two follow-up mailings should be scheduled to encourage those who have not responded to the first mailing.

Your Steering Committee may wish to draw up a list of individuals who could be contacted face-to-face for an appeal for more significant gifts. The list should probably not exceed 50 to 100 names, and some evaluation of how much could be expected from each should be prepared. It would not be too early to solicit these contributions through enrollment in an annual sustaining membership program. This requires considerable planning and preparation of materials, however, and may not be possible in the short time available to your committee.

Instructions for Ordering Resources for

# PLANNING FOR LUTHERAN HIGH SCHOOLS

Order materials from either of the following Synodical Education Offices:

Board of Parish Education
The Wisconsin Evangelical Lutheran Synod
3614 West North Avenue
Milwaukee, WI 53208

Board of Parish Education
The Lutheran Church-Missouri Synod
3558 So. Jefferson Avenue
St. Louis, MO 63118

Prices are as quoted plus postage. Make checks payable to: Board of Parish Education. Several documents refer to helpful supplementary materials which were not designed specifically for this project. They are not listed below but may also be ordered from the respective synodical office.

H01 GUIDELINES FOR GETTING STARTED . . . . . ~~.50~~ .75

The seven beginning steps of the Exploration Phase (I) with resources.

H02 PLANNING CHART . . . . . .25

Master outline of basic committee activities and materials for all six Phases.

H03 STEERING COMMITTEE HANDBOOK . . . . . ~~.50~~ .75

Guidelines for the Survey Phase (II) and the Planning Phase (III).

H04 BOARD OF DIRECTORS HANDBOOK . . . . . .50

Guidelines for the Implementation Phase (IV) and the Operating Phases (V, VI).

H05 "THANKS, WE NEED THAT" - SLIDE/SOUND PRESENTATION . . . . . $35.00

18 minute visual/oral two slide projectors/cassette player presentation of the values of Lutheran secondary education: 210 color slides, cassette recording, printed script, discussion suggestions, and options for adding local slides and accompanying script.

H06 RESOURCES FOR ORGANIZATION PLANNING . . . . . ~~.50~~ .75

Constitution, bylaws, administrator's job description, and policy guidelines.

H07 "THANKS, WE NEEDED THAT" - BROCHURES . . . . . $1.50 per 100

Series of 3 promotional brochures for mailings, bulletin inserts, and meetings.

H07A "Young People Say - Thanks, We Needed That"

H07B "Parents Say - Thanks, We Needed That"

H07C "The Community Says - Thanks, We Needed That"

H08 RESOURCES FOR ENROLLMENT PLANNING . . . . . ~~.50~~ .75

Strategies for recruitment, enrollment projections, and transportation.

H09 RESOURCES FOR FINANCIAL PLANNING . . . . . ~~.50~~ .75

Funding the feasibility study phases, the first year, and continuing years.

H10 MAINTAINING FISCAL RESPONSIBILITY . . . . . ~~$1.00~~ 1.25

Suggestions and forms for accounting, budgeting, and five-year projections.

H11 RESOURCES FOR SITE AND FACILITY SELECTION . . . . . .50

H12 RESOURCES FOR INSTRUCTION PLANNING . . . . . .50

Curriculum development, staffing, and compensation guidelines.

The most effective agencies available to the Church for equipping God's people for ministry are the Lutheran elementary and secondary schools.